

# 2021 LEA Compliance Report Screenshot Instructions

1. Any district user with a district role can upload or download to the LEA Document Library.
  - a. The [LEA User Access Form](#) has the roles that will allow a user to have access to the LEA Document Library.
  - b. A login is not needed to access TDOE Resources.
  - c. Here is a screenshot of the form, showing a common role of **LEA Data View** role, which allows a user to upload and download from ePlan's LEA Document Library.



## ePlan User Access Form for LEAs

Tennessee's Electronic Planning and Grants Management System

### Instructions:

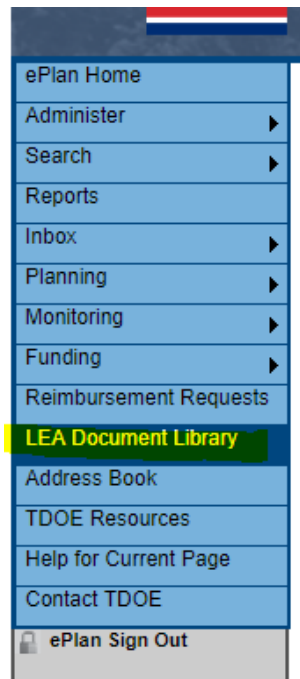
1. Fill out **LEA-user** information. If the user needs role(s) for a charter school or community based organization, see [ePlan.tn.gov > TDOE Resources > User Access Forms](#) for the correct forms.
2. Write and/or select **new user access role(s)**; do not include existing role(s). See [ePlan User Access Roles for LEAs](#) for a complete list.
3. To remove and/or copy access from previous users, check the appropriate options and write in previous user(s)'s full names.
4. Obtain required signatures. *Adobe Certificated Signatures* are acceptable.
5. Email the completed form to [ePlan.Help@tn.gov](mailto:ePlan.Help@tn.gov). **Copy all users who sign the form when submitting.**

User's Name: \_\_\_\_\_ LEA Name: \_\_\_\_\_ LEA ID #: \_\_\_\_\_  
 Email (ePlan User ID email, not SSD log-in): \_\_\_\_\_ Phone: \_\_\_\_\_

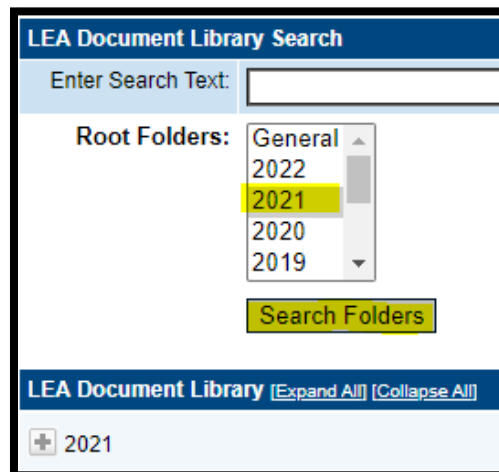
Funding Application/Grant Director Roles		Data View	
1		<input type="checkbox"/>	<b>LEA Data View Only:</b> view all ePlan components, upload to LEA Document Library but can't edit other ePlan components. (Allows user to be selected as a contact in the CFA)
2		<input type="checkbox"/>	<b>Fiscal &amp; Approve Roles</b>
3		<input type="checkbox"/>	<b>LEA Fiscal Update*</b> (Bookkeeper): request reimbursements from any funding app (CFO approval required for this role)
4		<input type="checkbox"/>	<b>LEA Fiscal Representative</b> (CFO/Finance Director): fiscal approve funding app.; complete FER; submit state funds app.
5		<input type="checkbox"/>	<b>Board Chair:</b> approve state funds app.
6		<input type="checkbox"/>	<b>County/City Clerk or SSD Recorder:</b> approve state funds app.
7		<input type="checkbox"/>	<b>LEA Authorized Representative:</b> final approve any funding app. & monitoring document (Only Director of Schools may have this role)
Monitoring Roles		LEA-Level Planning Roles	
1		<input type="checkbox"/>	<b>LEA Plan Data Entry:</b> edit LEA Plan. (This role is not for editing individual school plans.)
2		<input type="checkbox"/>	<b>LEA School Plan Reviewer:</b> edit, school- & LEA-approve school plan. (For LEA-level staff to review school plans)
3		<input type="checkbox"/>	<b>LEA User Access Admin.:</b> add users to edit school plan(s)
Other Roles			
1			
2			
3			

To copy and/or replace previous user(s): Select the correct check box(es) and provide name(s) of previous user(s)		
<input type="checkbox"/> Copy all access	<input type="checkbox"/> Remove all access <input type="checkbox"/> Remove access indicated above <i>only</i>	Previous User(s):

- Any user with an ePlan role will select the LEA Document Library from the main menu.



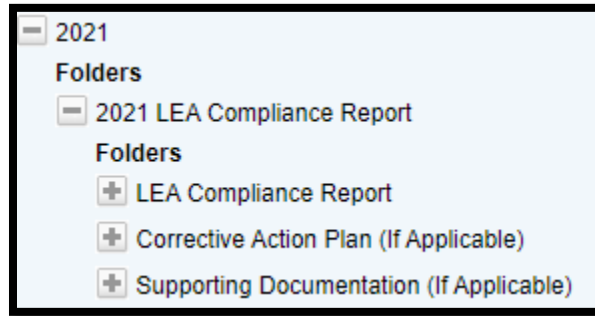
- To open the 2021 LEA Document Library, click on 2021 and hit show folders. Then click the + in front of the 2021 as shown below.



- Click the + to open this 2021 LEA Compliance Report.



5. There are 3 subfolders here.
  - a. The LEA Compliance Report
    - i. This is required.
  - b. Corrective Action Plan (If Applicable)
  - c. Supporting Documentation (If Applicable)



6. Click on the + to open these folders.



7. The LEA Compliance Report has a template that can be downloaded after clicking edit documents as shown below.



8. To download the template, click on the template.

Document Information	
Document Name	LEA Compliance Report (LEA Upload) Template
Folder Hierarchy	2021 2021 LEA Compliance Report LEA Compliance Report
Upload Begin Date	9/14/2021
Upload End Date	
Minimum Required Count	0
Maximum Allowed Count	
Document Template	LEA Compliance Report (LEA Upload) Template

9. To upload the Corrective Action Plan or Supporting Documentation, first click the **Edit Documents**.

LEA Document Library [Expand All] [Collapse All]	
2021	
Folders	
2021 LEA Compliance Report	
Folders	
LEA Compliance Report	
Corrective Action Plan (If Applicable)	
Documents	
LEA Compliance Report Corrective Action Plan (LEA Upload) <a href="#">Edit Documents</a>	
Supporting Documentation (If Applicable)	
Documents	
LEA Compliance Report Supporting Documentation (LEA Upload) <a href="#">Edit Documents</a>	

10. Click the **Upload Document** to upload the documents.

Document Information	
Document Name	LEA Compliance Report Corrective Action Plan (LEA Upload)
Folder Hierarchy	2021 2021 LEA Compliance Report Corrective Action Plan (If Applicable)
Upload Begin Date	9/14/2021
Upload End Date	
Minimum Required Count	0
Maximum Allowed Count	
<a href="#">Upload Document</a>	
Documents/Links	